



**my|CalPERS
Guide to
Adding New Contacts**

1. Enter your Username and Password. Select **Log In**.

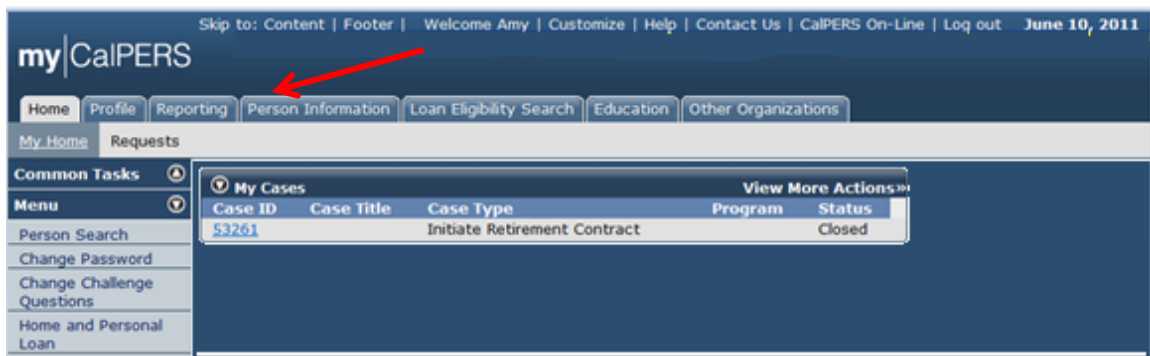
2. *Conditions of Use* page displays. Select **Accept**.

3. The *My Home* page displays.

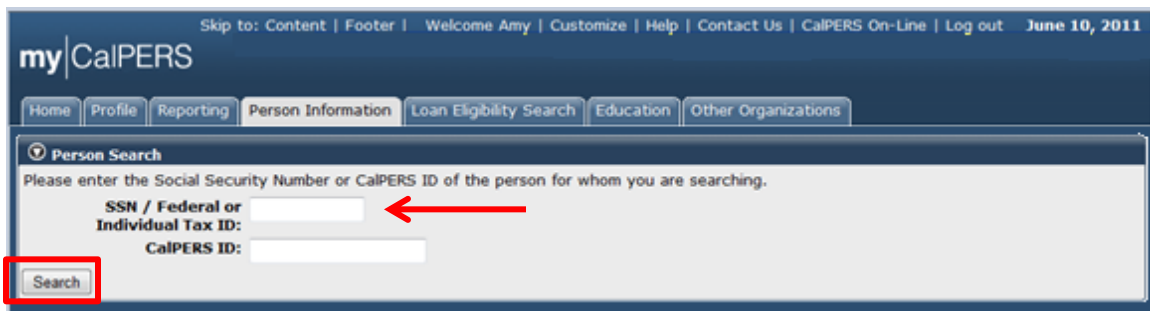
Before you can add a contact, you need to have the contact's CalPERS ID or their Social Security number and birthdate.

If you have the CalPERS ID of the contact, skip to **step 6**.

If the person is an employee of your organization and a CalPERS member, you can look up the Person Information for the contact to retrieve their CalPERS ID. Select the **Person Information** tab.



4. The *Person Information* page displays. Enter the SSN of the contact and select **Search**.



- The *Summary* page displays. You will see the **CalPERS ID** of the individual. Make note of the **CalPERS ID**. Select the **Profile** tab.

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Home Profile Reporting Person Information Loan Eligibility Search Education Other Organizations

Summary Health Enrollment Benefit Application

Common Tasks

Menu

- Appointment History
- Payroll Information
- Member Elections
- Contributory Appointment History
- Report Death

Summary

Profile

SSN: xxx-xx-7336
Name: Sandra Jones
Date of Birth: 09/08/1971
Prior School Membership: No
Restrictions: No

CalPERS ID: 3846381465
Optional Member: No
Date of Death:
Prior School Membership Date:

[Update Personal Information](#)

Communication

Preferred Communication: Mail
Primary Phone Number:
Primary Email Address:
Mailing Address: 555 BRIDGE ST
VACAVILLE, CA 95687
Phone Authentication Code: No

Undeliverable Date

[Update](#)
[Update](#)
[Update](#)

- The *Business Partner Profile* page displays. Select **Add New** on the Contacts section of the page.

Menu

- Contacts
- Relationships
- Divisions
- Findings

Summary

Profile

CalPERS ID: 5656306545
Federal Tax ID:
Category: Public Agency
County: Los Angeles

Status: Active
Name: Lowland Water District
Regional Office: Glendale Regional Office
Governing Body:

[Request Update](#)

Addresses

Physical: 3030 S FULLER RD
LOWLAND, CA 91774

Mailing: 3030 S FULLER RD
LOWLAND, CA 91774

Communication Information

Preferred Communication:
Primary Email: admin@lowlandwater.com
Primary Phone Number:

Contacts

[Add New](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main		Henry Adams	
General	Main	CalPERS Social Security	Amy Bender	

Business Relationships

[Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Retirement Contract	Active	01/01/1973	01/01/1973		
Social Security Agreement (218)	Active	04/18/1953	04/18/1953		

7. The *Contacts Detail* page displays. This is a view of the entire page.
Steps to complete each panel on the page begin with Step 8.

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my|CalPERS

Home Profile Reporting Person Information Loan Eligibility Search Education Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks

Menu

Contacts Relationships Divisions Findings

Name: Lowland Water District **CalPERS ID:** 5656306545 *Required Fields

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * **Contact Type Detail:** *

Programs Supported: ☐ CalPERS ☐ Social Security

Entity: * ☐ Person CalPERS ID: ☐ Individual Name: [Add New Person](#) ☐ Other:

☐ Allow System Access ☐ Make Contact Viewable to Other Organizations ☐ Primary Contact

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: **Address:** *

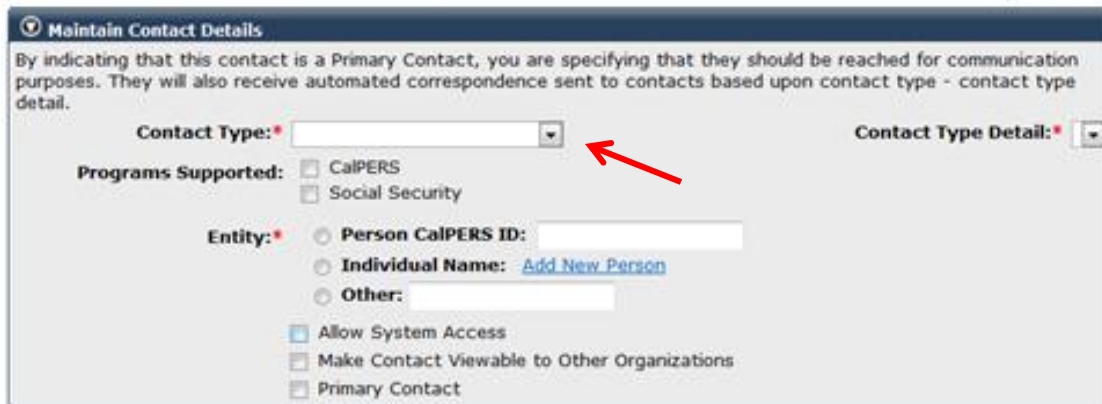
Country: * United States **City:** *
State: * California **Zip Code:** * -

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Work	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

8. In the Maintain Contact Details section:
 - a. Select the appropriate contact type from the **Contact Type** dropdown.



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * ▼ ↗

Contact Type Detail: * ▼

Programs Supported:

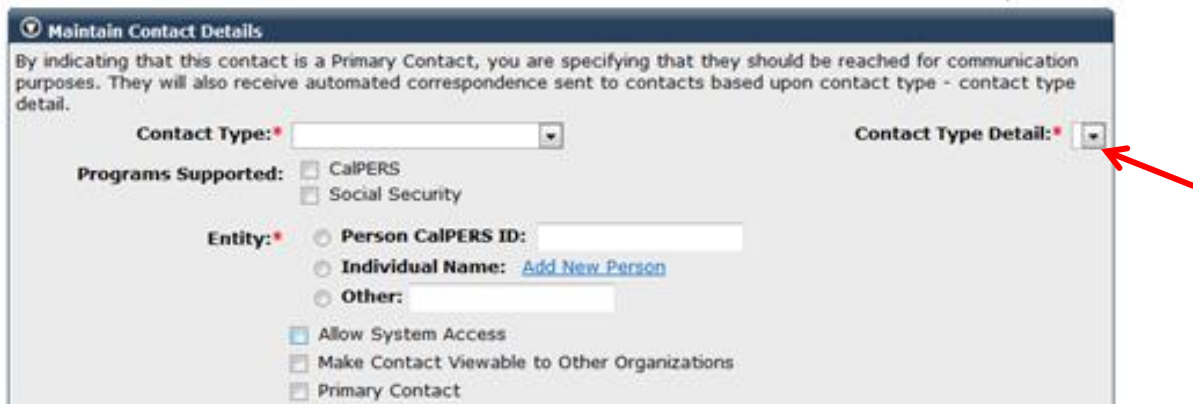
- ☐ CalPERS
- ☐ Social Security

Entity: *

- ☐ Person CalPERS ID:
- ☐ Individual Name: [Add New Person](#)
- ☐ Other:

- ☐ Allow System Access
- ☐ Make Contact Viewable to Other Organizations
- ☐ Primary Contact

- b. Select the appropriate contact type detail from the **Contact Type Detail** dropdown.



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * ▼

Contact Type Detail: * ▼ ↗

Programs Supported:

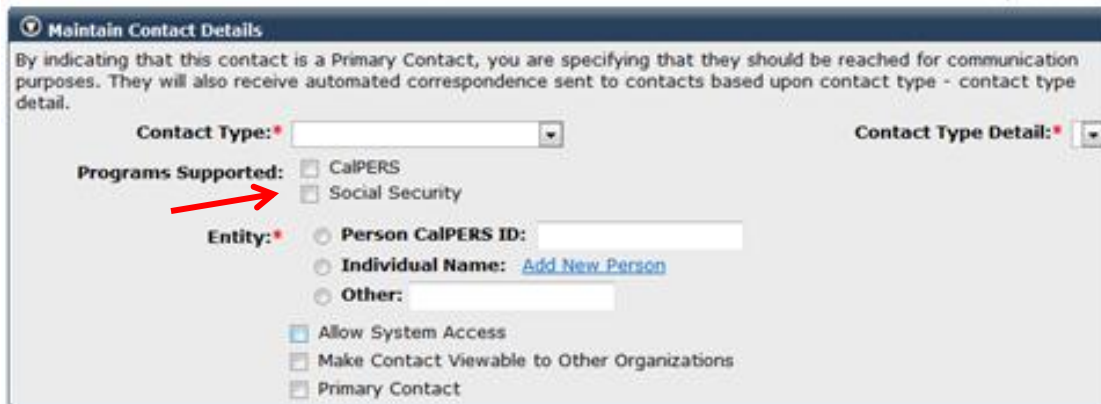
- ☐ CalPERS
- ☐ Social Security

Entity: *

- ☐ Person CalPERS ID:
- ☐ Individual Name: [Add New Person](#)
- ☐ Other:

- ☐ Allow System Access
- ☐ Make Contact Viewable to Other Organizations
- ☐ Primary Contact

- c. Select the appropriate checkboxes for **Programs Supported**.



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

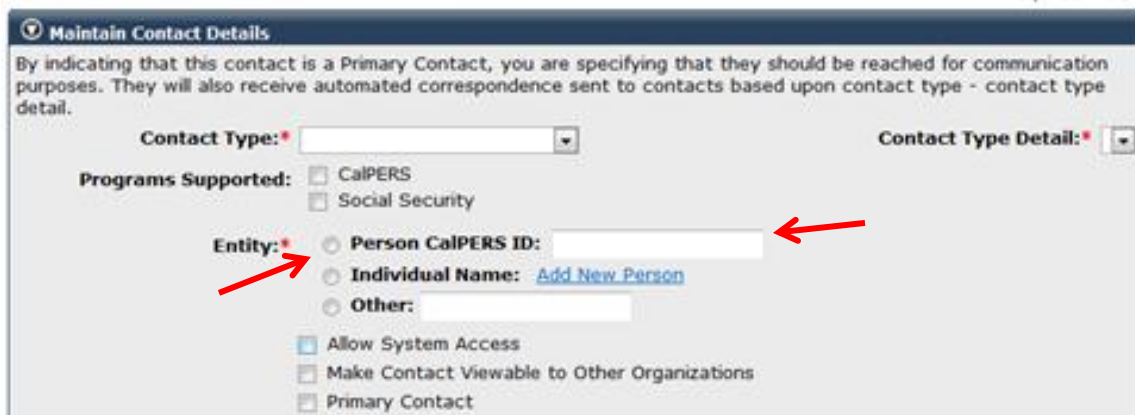
Contact Type: * **Contact Type Detail:** *

Programs Supported: ☐ CalPERS ☐ Social Security

Entity: * ☐ **Person CalPERS ID:** ☐ **Individual Name:** [Add New Person](#) ☐ **Other:**

☐ Allow System Access
☐ Make Contact Viewable to Other Organizations
☐ Primary Contact

- d. If you know the CalPERS ID of the contact, select the Person CalPERS ID radio button and enter the CalPERS ID of the participant. Skip to **step 8i**.



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * **Contact Type Detail:** *

Programs Supported: ☐ CalPERS ☐ Social Security

Entity: * ☐ **Person CalPERS ID:** ☐ **Individual Name:** [Add New Person](#) ☐ **Other:**

☐ Allow System Access
☐ Make Contact Viewable to Other Organizations
☐ Primary Contact

- f. Select the **Individual Name** radio button. Select **Add New Person**.

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * Contact Type Detail: *

Programs Supported: ☐ CalPERS ☐ Social Security

Entity: *

- ☐ Person CalPERS ID:
- ☐ Individual Name: [Add New Person](#)
- ☐ Other:

☐ Allow System Access
☐ Make Contact Viewable to Other Organizations
☐ Primary Contact

The screenshot shows a web form titled 'Maintain Contact Details'. It includes a text area explaining the 'Primary Contact' designation. Below this are fields for 'Contact Type' and 'Contact Type Detail'. There are checkboxes for 'Programs Supported' (CalPERS, Social Security). The 'Entity' section has three radio button options: 'Person CalPERS ID', 'Individual Name' (which is linked to 'Add New Person'), and 'Other'. Two red arrows point to the 'Individual Name' radio button and the 'Add New Person' link. At the bottom are three more checkboxes: 'Allow System Access', 'Make Contact Viewable to Other Organizations', and 'Primary Contact'.

- g. The *Person Details* page displays. Enter the **First Name**, **Last Name**, **SSN** and **Date of Birth** of the contact. Select **Save**.

If the individual exists and has a CalPERS ID, matching on First and Last name, SSN and Birthdate will associate this new contact with the existing CalPERS ID for the individual.

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myCalPERS

Home | Profile | Reporting | Person Information | Loan Eligibility Search | Education | Other Organizations

Summary | Payments | Receivables | Retirement Contract | Health Contract | Agreements | Mergers and Reorganizations

Common Tasks ⓘ

Menu ⓘ

- Contacts
- Relationships
- Divisions
- Findings

Person Details ⓘ *Required Fields

Prefix: First Name: * Linda Middle Name: Last Name: * Smith

Suffix: SSN: 355-97-2345 Date of Birth: 03/24/1964 Gender:

Preferred Communication Details

Preferred Communication:

Address Details

Address Type:

Address:

Country: United States

City:

State: California

Zip Code:

Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Fax	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Office	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary ☐ Email

Save Cancel Clear

- h. The *Contact Details* page displays with the name of the person assigned to the contact

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type:* General **Contact Type Detail:*** Main

Programs Supported: ☒ CalPERS

Entity:* ☐ Person CalPERS ID:
☒ Individual Name: Linda Smith [Add New Person](#)
☐ Other:

☐ Allow System Access
☐ Make Contact Viewable to Other Organizations
☐ Primary Contact

- i. Select the checkbox next to **Allow System Access**. If appropriate, also select the checkbox for **Make Contact Viewable to Other Organizations** and **Primary Contact**.

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type:* General **Contact Type Detail:*** Main

Programs Supported: ☒ CalPERS

Entity:* ☒ Person CalPERS ID: 1234567891
☐ Individual Name: [Add New Person](#)
☐ Other:

☒ Allow System Access
☐ Make Contact Viewable to Other Organizations
☐ Primary Contact

- j. In the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the dropdown.

Maintain Preferred Communication Details

Preferred Communication: [Add New Person](#)

- k. In the Maintain Contact Address Details section, select the appropriate value from the **Existing Business Partner Address** dropdown if the business address is used for the contact. Otherwise, enter the Address, City, State and ZIP Code.

Maintain Contact Address Details

Existing Business Partner Address :

Address: *

Country: *

City: *

State: *

Zip Code: * -

- l. In the Maintain Communication Details section:
 - i. Select the radio button for the **Primary** phone type and enter the phone number and extension. Use the checkbox to indicate if it is an **International** number.

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Work	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

- ii. Select the radio button for the **Primary** email type and enter the email address.

11

9. Here is how the page might look when completed. Select **Save**.

Name: Lowland Water District **CalPERS ID:** 5656306545
 *Required Fields

Maintain Contact Details
 By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.

Contact Type: * General **Contact Type Detail:** * Main

Programs Supported: ☒ CalPERS
☒ Social Security

Entity: * ☒ Person CalPERS ID: 1234567891
☐ Individual Name:
☐ Other:

☒ Allow System Access
☐ Make Contact Viewable to Other Organizations
☒ Primary Contact

Maintain Preferred Communication Details
Preferred Communication: Email

Maintain Contact Address Details
Existing Business: Physical
Partner Address :
Address: 3030 S FULLER RD
Country: United States
City: LOWLAND **State:** California
ZIP Code: 91774

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>
<input checked="" type="radio"/>	Work	916-456-7890	1141	<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	admin@lowlandwater.com	
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

- The *System Access* page displays. Enter the **Contact Username** and select the appropriate checkboxes in the Assign Roles section. Select **Save**.

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my|CalPERS

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Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks

Menu

- Contacts
- Relationships
- Divisions
- Findings

Name: Lowland Water District **CalPERS ID:** 5656306545

*Required Fields
*Required Fields

Assigned Username

Contact Name:

Contact Username: * Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: at signs (@), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. **Usernames are not case sensitive.**

Assign Roles

Select All

Role
<input type="checkbox"/> Authorized Personal Loan Representative
<input type="checkbox"/> Business Partner AP/Billing
<input type="checkbox"/> Business Partner AP/Billing RO
<input type="checkbox"/> Business Partner Direct Authorization
<input checked="" type="checkbox"/> Business Partner Employer Inquiry
<input type="checkbox"/> Business Partner Employer Maintenance
<input type="checkbox"/> Business Partner Health Contracts
<input type="checkbox"/> Business Partner Health Enrollment
<input type="checkbox"/> Business Partner Health Enrollment RO
<input type="checkbox"/> Business Partner IME/JA
<input type="checkbox"/> Business Partner Limited
<input type="checkbox"/> Business Partner PA Billing
<input type="checkbox"/> Business Partner Payroll
<input type="checkbox"/> Business Partner Payroll RO
<input type="checkbox"/> Business Partner Reciprocal
<input type="checkbox"/> Business Partner Retirement Contracts
<input type="checkbox"/> Business Partner Retirement Enrollment
<input type="checkbox"/> Business Partner Retirement Enrollment RO
<input type="checkbox"/> Business Partner SCP Certification
<input type="checkbox"/> Business Partner Supplemental Income Plan
<input type="checkbox"/> Carrier
<input type="checkbox"/> System Access Administrator

Select All

Save

11. The *Password Maintenance* page displays. The username just created is assigned a temporary password.

Be sure to capture this username and temporary password. It is the only time the temporary password will be available. Select **Continue**.

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my|CalPERS

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Common Tasks **Menu**

Contacts Relationships Divisions Findings

Name: Lowland Water District **CalPERS ID:** 5656306545

Password Maintenance

The following Username has been created and assigned the displayed temporary password. This password will expire in 30 days:

Username: lauram
Password: kd8xd@gbD

Continue

12. The contact has been added and now displays in the **Contacts** list.

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my|CalPERS

Home Profile Reporting Person Information Loan Eligibility Search Education Other Organizations

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Common Tasks **Menu**

Contacts Relationships Divisions Findings

Name: Lowland Water District **CalPERS ID:** 5656306545

Contacts to Display

Active: Yes **Program:** All

Display

Contacts **Add New**

Contact Type	Contact Type Detail	Program	Name	Phone Number	Active	Primary
General	Main	CalPERS Social Security	Laura Miller	(916)456-7890	Y	Y
General	Main	CalPERS Social Security	Henry Adams		Y	N
General	Main	CalPERS Social Security	Amy Bender		Y	N

13. Provide the username and temporary password to the contact so they can log in to establish their new password and responses to security questions.

System Support Contacts

To ensure that email notifications are sent to the appropriate contact when files are ready for pick up, please create a System Support contact in your Business Partner profile.

Files for pickup include:

- Response files for payroll contribution, retirement enrollment, or health enrollment transactions sent via FTP
- Response files for deduction request transactions sent via FTP
- Deduction registers

Setting up a contact to receive notification for file processing status is very similar to adding any other contact, but there are some key values that need to be set for this to work correctly. These steps should be familiar to you, so this is a summary of the steps to add a contact highlighting the unique values that are required for the email notification of file status to work.

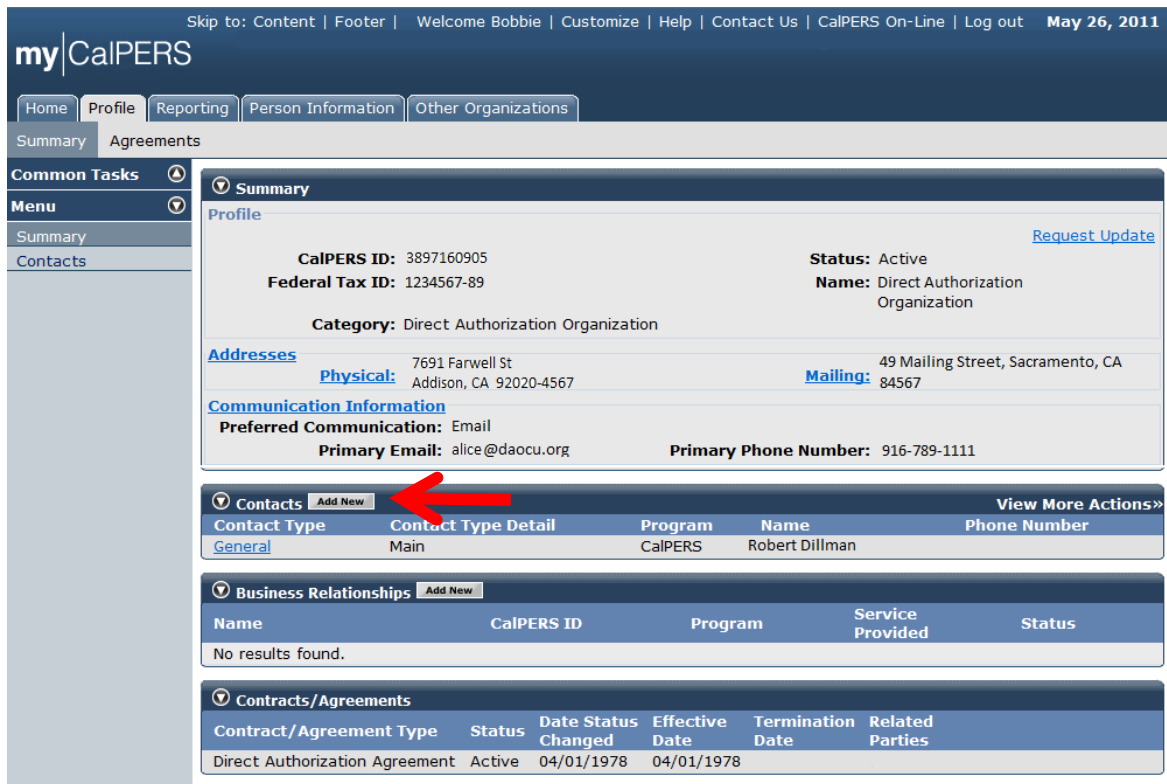
1. If you are the System Access Administrator, log in to my|CalPERS and select the **Profile** tab.



The screenshot shows the my|CalPERS web application interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 26, 2011. Below this is a dark blue header with the my|CalPERS logo. A secondary navigation bar contains tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The 'Profile' tab is highlighted with a red arrow. Below the tabs is a 'My Home' section. On the left, there is a 'Common Tasks' menu with links: Person Search, Change Password, Change Challenge Questions, and View More Actions». The main content area displays a table titled 'My Cases' with columns: Case ID, Case Title, Case Type, Program, and Status. A single row is visible with Case ID 731879, Case Title Initiate DA Agreement, and Status Closed.

Case ID	Case Title	Case Type	Program	Status
731879	Initiate DA Agreement			Closed

2. On the *Profile* page, select **Add New** in the Contacts panel.



Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks

Menu

Summary
Contacts

Summary

Profile

CalPERS ID: 3897160905 **Status:** Active [Request Update](#)
Federal Tax ID: 1234567-89 **Name:** Direct Authorization Organization
Category: Direct Authorization Organization

Addresses

Physical: 7691 Farwell St
Addison, CA 92020-4567 **Mailing:** 49 Mailing Street, Sacramento, CA 95811

Communication Information

Preferred Communication: Email
Primary Email: alice@daocu.org **Primary Phone Number:** 916-789-1111

Contacts [Add New](#) [View More Actions>>](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

3. On the *Contacts* page, select the **Contact Type** dropdown.
4. On the **Contact Type** dropdown, select **System Support**. The Contact Type for file processing status notification must be System Support.
5. Select **None** from the **Contact Type Detail** dropdown. Select the Entity appropriate for the contact.
 - a. If the System Support contact is a CalPERS participant, select **Person CalPERS ID** and enter the CalPERS ID in the window.
 - b. If the System Support contact is not a CalPERS participant, select the **Individual Name** radio button and complete the Person Details information, save it, and continue completing this page.
 - c. The primary System Support contact will receive email notifications of file status. Select the **Primary Contact** checkbox.

6. Select **Email** from the **Preferred Communication** dropdown. To receive notification emails, the System Support contact must have Email selected as the Preferred Communication method.
7. Select the appropriate value from the **Existing Business** dropdown or complete the fields marked with a red asterisk in the Maintain Contact Address Details panel.
8. Select the radio button to indicate the primary email address and enter the address in the email window in the Maintain Contact Communication Details panel. The **Primary** radio button must be selected and the appropriate email address must be entered for the System Support contact to receive the file status notifications. Then select **Save**.